ESET

REMOTE ADMINISTRATOR

Migration guide

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migration guide

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1. Introduction

This document is intended to make migration from older versions of ERA to ESET Remote Administrator 5 as smooth and secure as possible. The new generation of ESET Remote Administrator offers many new features such as web dashboard and the user manager tool, and also supports new client solution features.

ESET Endpoint Security and ESET Endpoint Antivirus are new client security solutions and are direct successors of ESET Smart Security BE and ESET NOD32 Antivirus BE. Therefore, licenses for these products are compatible with new versions.

This document serves as a migration guide, for more information about ESET Remote Administrator, please download the latest version of the ESET Remote Administrator 5 user manual.

2. Prepare for the migration

2.1 Server backup

Before beginning migration we recommend that you backup all important data from your ESET Remote Administrator server to ensure its security. This way if reinstallation should fail for any reason you can restore the saved database to a fresh installation of ESET Remote Administrator 4.x. Before migrating ESET Remote Administrator to a new version, create a backup of your current database using the ESET Remote Administrator Maintenance Tool.

Consider backing up your */license* folder, this folder contains all license files and information you uploaded to ESET Remote Administrator.

In addition to backing up the ESET Remote Administrator database, you can also backup ESET client installation packages, ERA policies, policy rules, ERAC settings and custom notification settings. This is recommended for administrators who wish to retain their settings after migration. To do so, make a backup copy of the *Policy_Configuration*, *PolicyRules_Configuration* and *Notification_Config* folders, as well as the *era.xml* file, located in the directories listed below:

- **ESET Remote Administrator Server file system storage**:

  Server 2003, XP: *C:\Documents and Settings\All Users\Application Data\ESET\ESET Remote Administrator\Server\storage*

  Server 2008, 2011, Windows 7: *C:\ProgramData\ESET\ESET Remote Administrator\Server\storage*

- **ESET client installation packages**:

  Server 2003, XP: *C:\Documents and Settings\All Users\Application Data\ESET\ESET Remote Administrator\Server\packages*

  Server 2008, 2011, Windows 7: *C:\ProgramData\ESET\ESET Remote Administrator\Server\packages*

- **ESET Remote Administrator Server** configuration (SMTP, Mirror configurations, etc.):

  Server 2003. XP: *C:\Documents and Settings\All Users\Application Data\ESET\ESET Remote Administrator\Server\configuration\era.xml*

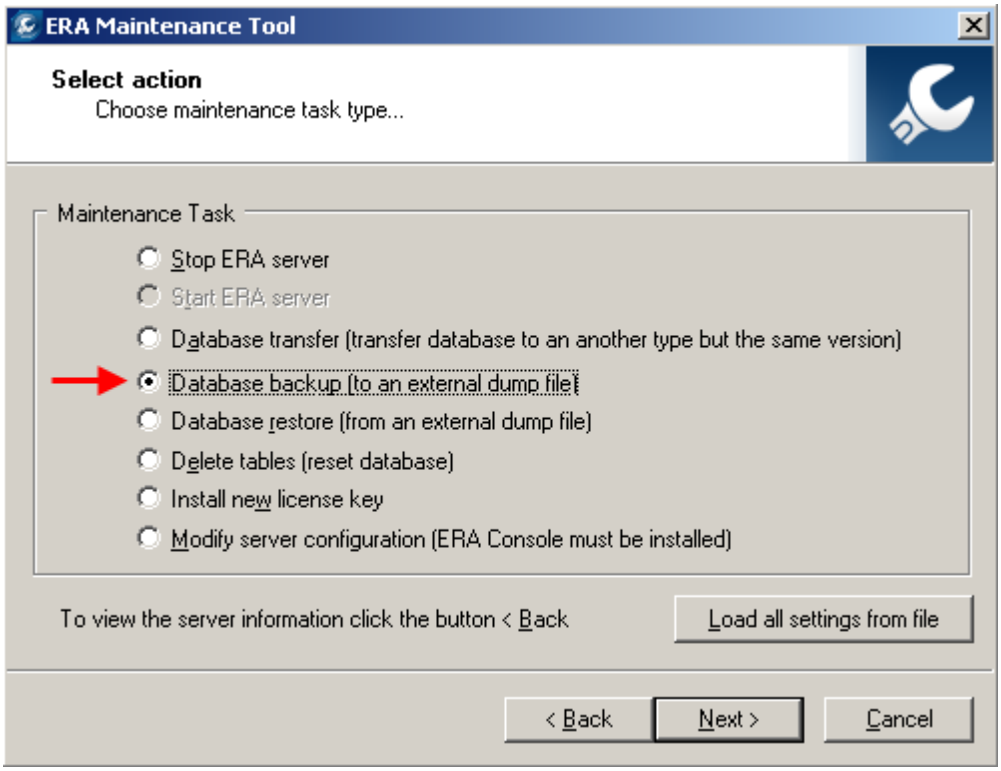
  Server 2008, 2011, Windows 7: *C:\ProgramData\ESET\ESET Remote Administrator\Server\configuration\era.xml*

NOTE:You may also want to backup the */reports* folder, that contain any saved reports generated by ESET Remote Administrator.

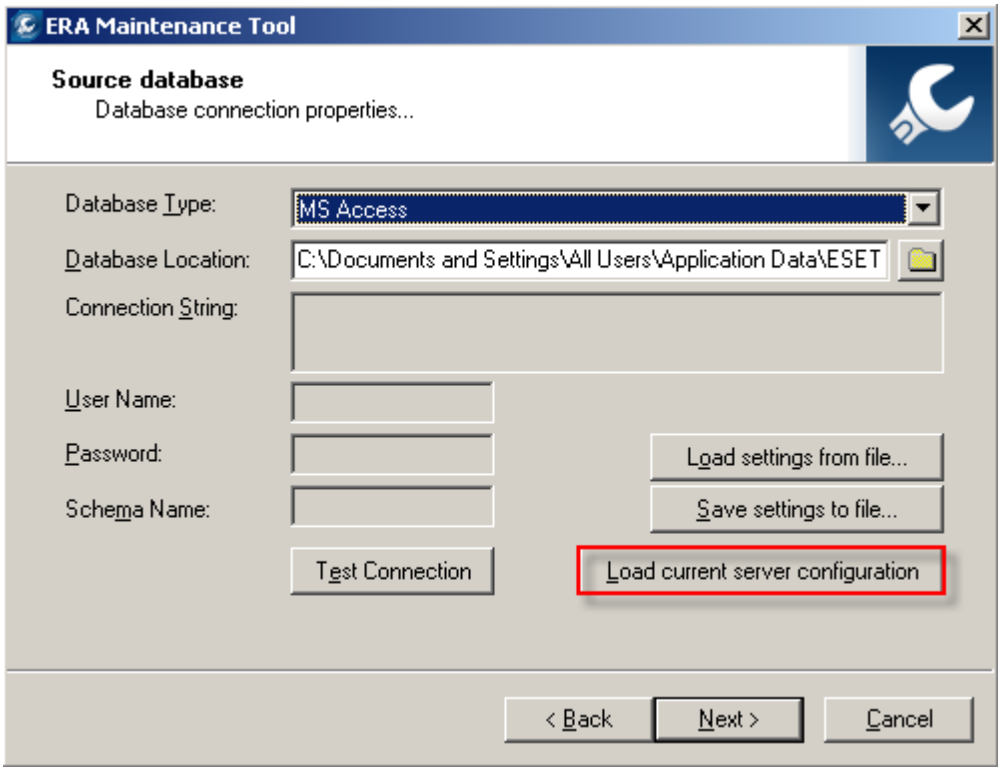
2.2 Database backup

We strongly recommend that you perform a database backup before beginning. You can use a third party backup tools or the ERA Maintenance Tool, which is integrated into ESET Remote Administrator. In this guide we will show you how to use the the ERA Maintenance Tool to safely perform a database backup task.

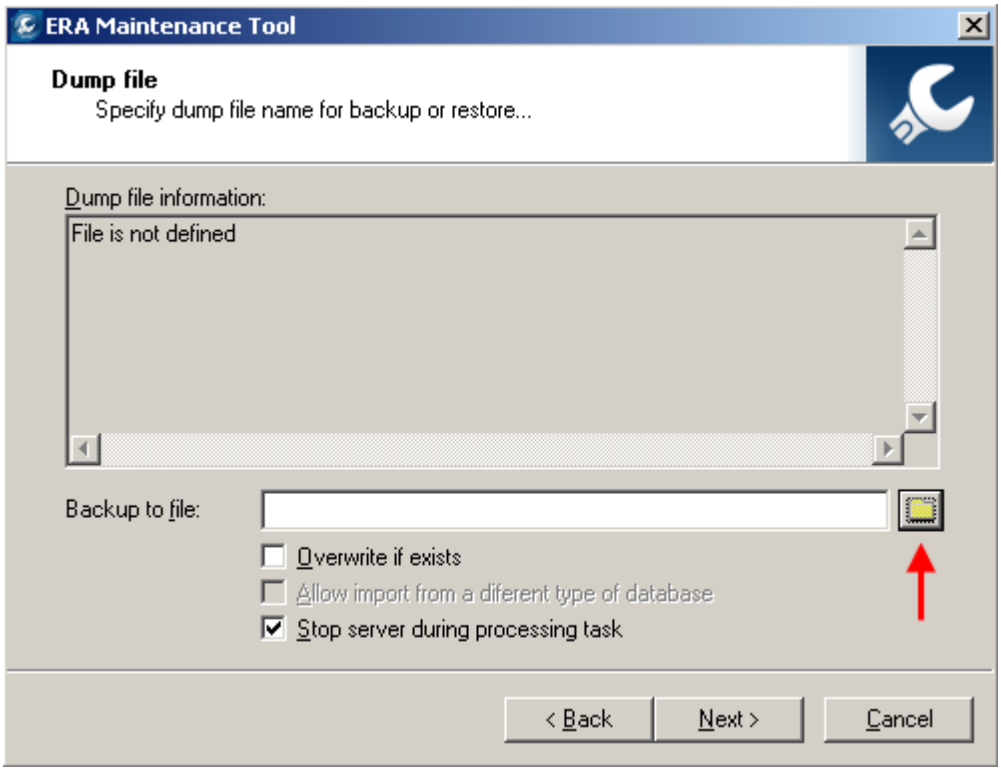
1. Click **Start** > **All programs** > **ESET** > **ESET Remote Administrator Server** > **ESET Remote Administrator Maintenance Tool**.
2. Click **Next** twice in the **ERA Maintenance Tool** window.
3. Select **Database backup (to an external dump file)** and click **Next** in the **Maintenance Task** section.


ERA Maintenance Tool
Select action
Choose maintenance task type...
Maintenance Task
Stop ERA server
Start ERA server
Database transfer (transfer database to an another type but the same version)
Database backup (to an external dump file)
Database restore (from an external dump file)
Delete tables (reset database)
Install new license key
Modify server configuration (ERA Console must be installed)
To view the server information click the button < Back
Load all settings from file
< Back
Next >
Cancel

4. Click **Load current server configuration** (default is MS Access) in the **Database connection properties** section.



5. Click **Test connection** to ensure that your network connection is functioning properly.
6. Click **Save settings to file** and save the configuration file to the location of your choice. Click **Next**.
7. Specify where to save the dump file and click **Next**.


ERA Maintenance Tool
Dump file
Specify dump file name for backup or restore...
Dump file information:
File is not defined
Backup to file:
Overwrite if exists
Allow import from a diferent type of database
Stop server during processing task
< Back
Next >
Cancel

8. Click **Start**. Click **OK** when the backup completes and then click **Finish**.

2.3 Server name mismatch

This issue occurs most commonly when migrating the same version of ERA to a different computer, but can sometimes occur during an upgrade. The issue is indicated by the following error message in the server log: *The server name stored in the database (NAME_B) does not match the actual server name (NAME_A). This can mean the database is used by another server. If you want to continue using this database enable "Ignore database server name mismatch" setting in the server advanced settings, or run the server once with the switch /server_name_repair to repair the server name stored in the database*.

There are two methods to resolve this issue if it occurs:

Method 1 (Ignore the server name mismatch)

1. Open the ESET Remote Administrator Console (ERAC) by double-clicking the ERAC icon on your Desktop, or by clicking **Start** > **All Programs** > **ESET** > **ESET Remote Administrator Console** > **ESET Remote Administrator Console**.
2. Click **Tools** > **Server Options**.
3. Click the **Advanced tab**, then click **Edit Advanced Settings**.
4. In the **ESET Configuration Editor**, expand **ESET Remote Administrator** > **ERA Server** > **Setup** > **Advanced** and select **Ignore database server name mismatch**.
5. Select the check box next to **Yes** / **No** and click **Console** to save your changes.
6. Click **OK** to exit the Server Options window.

Method 2 (Repair the server name mismatch)

1. To stop the ERA Server services, click **Start** and type *services.msc* into the search field and then click **Enter** to confirm, or click **Start** > **Administrative Tools** > **Services**.
2. In the **Services** window, right-click the **ESET Remote Administrator Server** service and select **stop** from the context menu.
3. Click **Start** and type *cmd* into the search field and then click **Enter** to confirm.
4. In the command prompt, navigate to the folder where the server application is stored (by default, *C:\Program Files\ESET\ESET Remote Administrator\Server*).
5. Run the *era.exe* executable with the switch */server_name_repair*.
6. This command will repair the server name in the database and the error message will no longer occur.

3. Migration

We recommend that you perform a direct reinstall over your old version of ERA (in this case, version 5.x over version 4.x). When using version 3.x, we recommend that you upgrade to version 4.x first and then to 5.x, rather than upgrading directly from 3.x to 5.x.

Double-click the installer file and follow the instruction on the screen. Note the new settings (Dashboard server, Service Accounts, Logging options,Server maintenance options and so on). You can read more about these settings in the ESET Remote Administrator 5 user manual. The ERA Server service will need to be restarted for migration, which will terminate all client connections. We recommend that you perform migration during non-work hours for this reason.

NOTE: Version 4.x and Version 5.x Server services (this is valid also for replicated servers) are not compatible.

3.1 Migration

Recommendations:

- **Database transfer** - we recommend that you allocate free hard drive space equal to at least 3 times the size of your current database for the migration. This is for migration purposes only, the database will be shrunk during server maintenance once migration is finished.

NOTE: Insufficient disk space is a common cause of migration failure.

- **Replicated servers** - It is up to the administrator to decide whether to start the installation from the top servers and then install to lower servers, or vice versa.

1. **Starting from the top server** - After you upgrade your top server to the latest version of ERA, communication with servers running the older version is not possible. To keep track of clients and data, connect to the servers from a machine that is still using an older version of ERA Console.
2. **Starting from the lower servers** - If you start migration on lower servers, you can maintain a comprehensive overview of your network. Keep in mind that servers running a newer version of ERA can not communicate with servers running an older version of ERA.

NOTE: If you upgrade a server to a newer version of ERA, it can not communicate with other servers running older versions. Data received by the servers that have not yet been updated (logs,reports,etc) is not lost, it is saved locally to the individual servers.

If you plan to migrate to a different PC with the same ERA version, please visit this KB Article.

3.2 Migrating and upgrade across localized versions of ERA

Known Issues

- Reports generated in a different language version are not localized after the upgrade.
- Reports where the condition "*Group by*" is used may display duplicated data after the upgrade when receiving new logs.
- Replication between different language versions is not fully supported, however, such replication should work once you enable and configure it (Replication to/from a server with a different language version of ERA). Logs may be recorded in different languages in this situation because some of the logs are being received from the server and some from the client.

When migrating between different language versions of ESET Remote Administrator, no errors should occur. See below for instructions specific to your scenario:

1. **ESET Remote Administrator 5** to **ESET Remote Administrator 5** of different versions and languages: Select a **repair** installation when reinstalling and follow the on-screen instructions.
2. **ESET Remote Administrator 4** to **ESET Remote Administrator 5** of different languages: Select an **upgrade** installation and follow the on-screen instructions. The same steps as described in the Migration chapter apply.
3. **ESET Remote Administrator 5** > **ESET Remote Administrator 5** of the same version but a different language: The program will prompt you to reinstall, follow the on-screen instructions.

This guide is intended to assist users upgrading from earlier versions of ESET Remote Administrator (V4.x and older) to ESET Remote Administrator 5, as described in scenario 2. Scenarios 1 and 3 are covered in case you want to perform such an installation later.

NOTE: Your product version (for both ERA Console and ERA Server) can be determined from the ESET Remote Administrator Console menu. Click **Help** > **About ESET Remote Administrator Console** and view the **Version** row. The version of the server is listed in the **Information:** field below, in the **Server:** row.

3.3 Upgrading your clients

1. If you are upgrading your clients to ESET Endpoint Security/ESET Endpoint Antivirus locally, the steps are very simple. Click on the new installation file (fore example *ees_nt32_enu.msi*) and follow the on-screen instructions. Select **Use current settings** when prompted to use your configuration from an earlier installation of ESET. For more information, see the ESET Endpoint Security or ESET Endpoint Antivirus user`s manual.
2. If you are upgrading client workstations remotely via ESET Remote Administrator, select the **Upgrade client** remote installation type in the remote installation tab. This type of installation is designated for clients with ESS/EAV version 4.2 and later. Beginning with version 4.2, a new upgrade mechanism was implemented that allows ERA to initiate the upgrade process on the client side without the need for the *einstaller.exe* agent. This mechanism works in a manner similar to the program component update, or PCU, which upgrades clients to a newer version of the program. For version 4.2 and later ESS/EAV clients, we strongly recommend this type of upgrade.

NOTE: If a custom configuration file has been defined for the installation package it will be ignored during the upgrade.

The **Upgrade Client** command allows you to remotely upgrade a client/group of clients.

1. In the ESET Remote Administrator Console, select clients you want to upgrade from the **Client** tab.
2. Click **Add Clients Special** if you want to use the selection tool to choose which clients to upgrade. After you finish making your selections click **Next** to continue.

NOTE: Clicking **Add Clients Special** opens a new window in which you can add clients by server (in the **Servers** section) or by group (in the **Groups** section).

3. In the **Package settings** window you can use the respective pull-down menus to select the **Type** and the **Name** of the ESET product package that will be used to upgrade your client(s). After you finish making your selections click **Next**.
4. In the **Task settings** window you can change the default name and description of your upgrade task, select **Apply task now** if you want the task to execute immediately or **Apply task later** if you want to setup a later date for the task execution. Click **Finish** to complete the configuration of your upgrade client task.

For more information on upgrading your clients, see the ESET Remote Administrator 5 user manual.

NOTE: This task works only on clients that connect directly to the primary server. Clients on replicated servers will be ignored.

NOTE: It is up to the administrator to decide whether to upgrade the server and then the clients, or vice versa based on the specifics and needs of your network.

3.4 Policy migration

The ESET Configuration Editor is different in ESET Remote Administrator 5 than in previous versions, with separate branches for version 4 and version 5 settings. Configurations exported from client workstations running version 4 endpoint products, when merged with a new ERA5 configuration, will only be applied to version 4 machines.

- **Version 4.2 and later ESET Business Edition users**: You can preserve existing settings by upgrading an individual client workstation and then exporting the settings from that workstation as an .xml configuration. You can then import that configuration into ESET Remote Administrator 5 and use it to create a new policy.
- **Version 4.0.xxxx and earlier ESET Business Edition users**: We recommend that you export the configuration you want to duplicate from a client workstation before upgrading. Settings from ESET Business Edition products will not carry over automatically, however you can access the exported configuration file to use as a reference when creating your new policy.

If you have a number of settings already configured on a client workstation running ESET NOD32 Antivirus Business Edition/Smart Security Business Edition version 4.2, follow the step-by-step instructions below to export your configuration from a client workstation and implement it as a policy in **ESET Remote Administrator Console**.

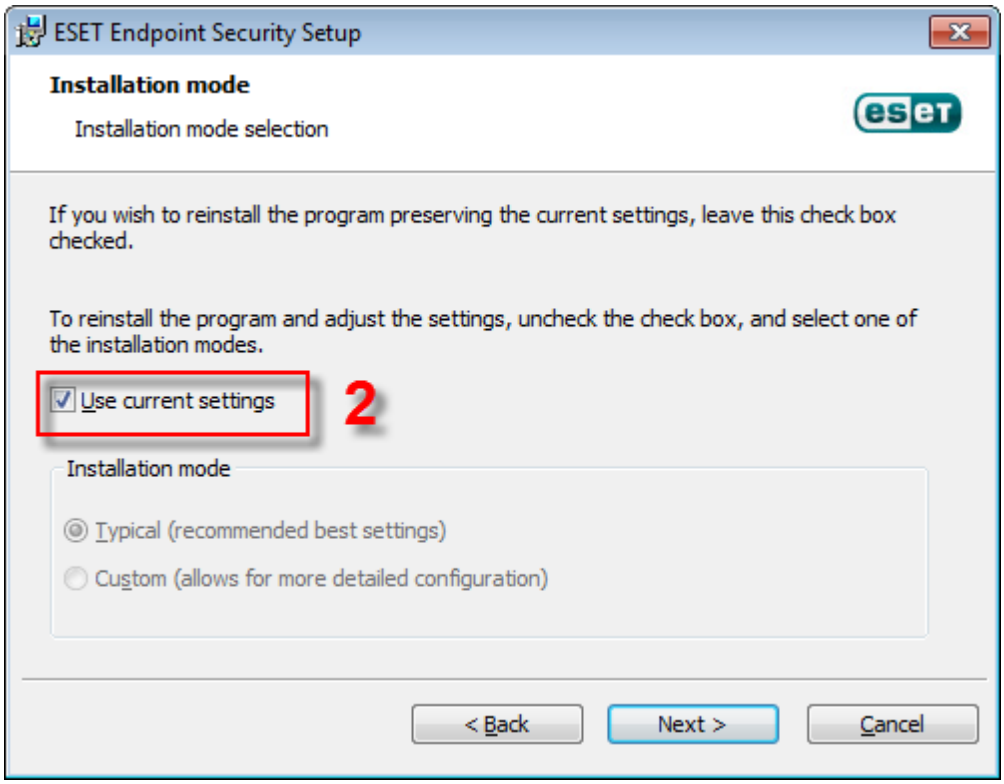
Important: Perform part I of the instructions below from the client workstation with the configuration you want to duplicate, perform part II from the computer where you have ESET Remote Administrator Console installed.

- **Client workstation**

1. On the client (running an earlier version of ESET) that has the settings you want to use as your new policy, open the

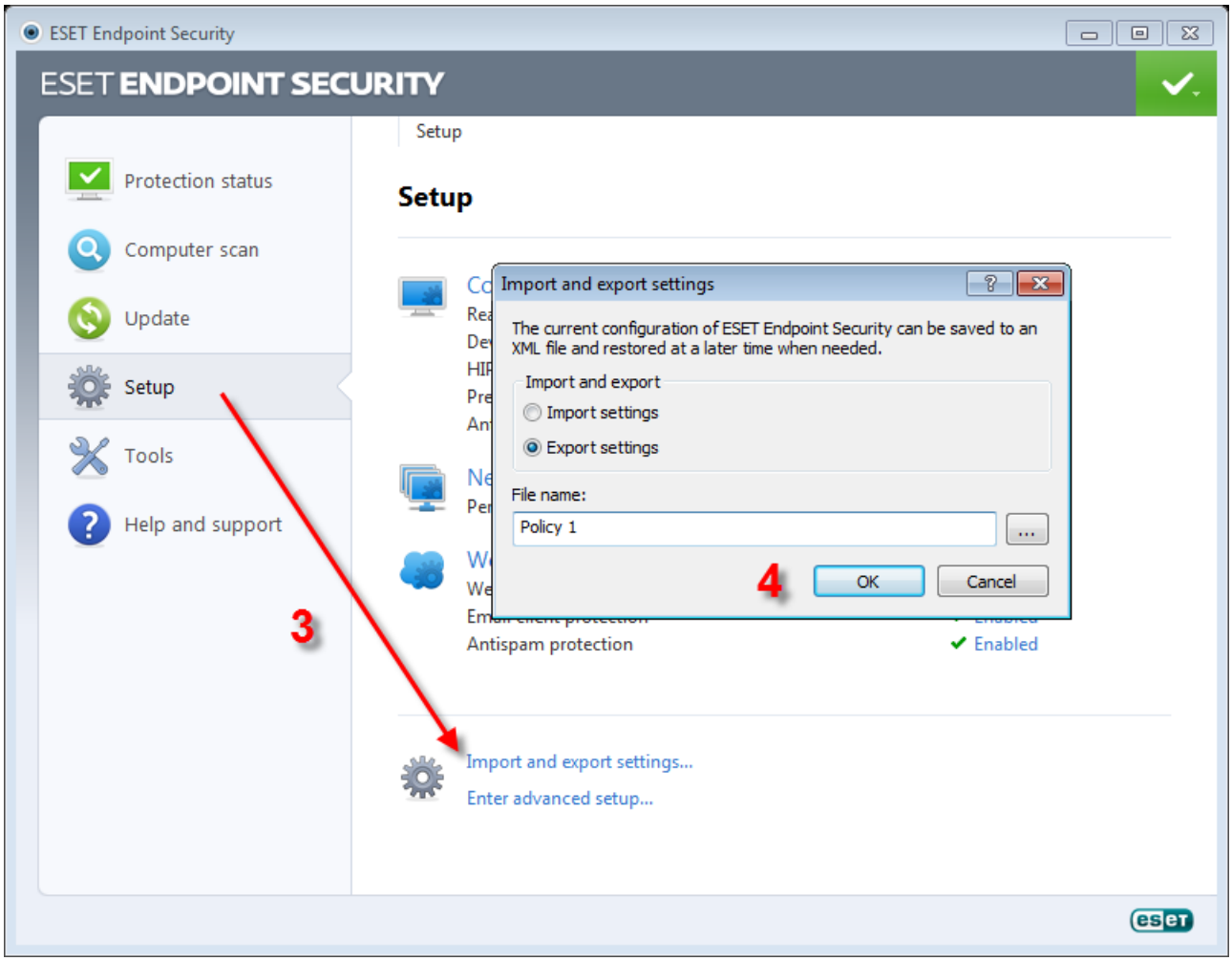
main program window by double-clicking the ESET icon in your Windows notification area or by clicking **Start** > **All Programs** > **ESET** > **ESET Smart Security** or **ESET NOD32 Antivirus**. Note your current settings and configure the client.

2. Upgrade this client to the new product version. At the **Installation mode** window, select the check box for **Use current settings**.


ESET Endpoint Security Setup
Installation mode
Installation mode selection
eset
If you wish to reinstall the program preserving the current settings, leave this check box checked.
To reinstall the program and adjust the settings, uncheck the check box, and select one of the installation modes.
Use current settings
2
Installation mode
Typical (recommended best settings)
Custom (allows for more detailed configuration)
< Back
Next >
Cancel

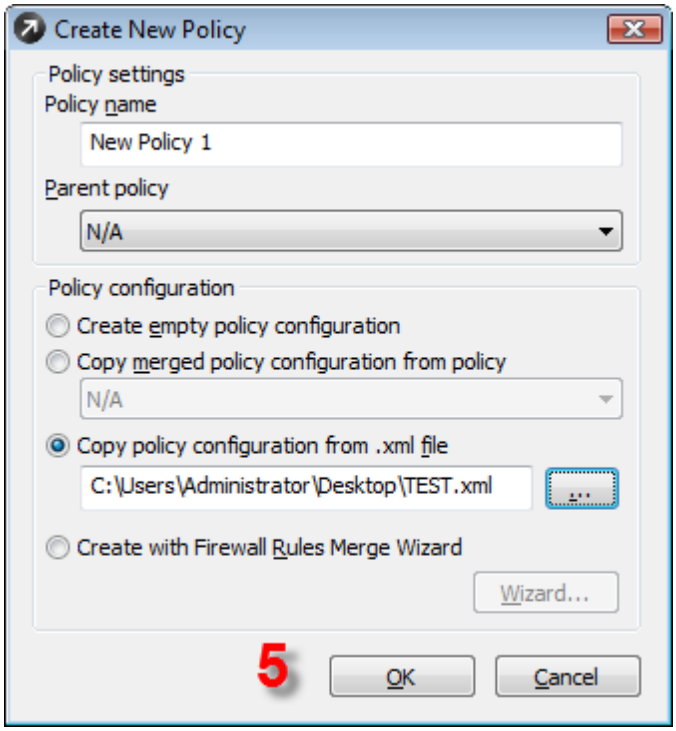
3. After the upgrade is complete, check to make sure your settings are still in place and then click **Setup** > **Import and export settings**.

4. In the **Import and export settings** dialog box select **Export settings**, enter a name for your configuration and click **OK** to export the configuration to an *.xml* file. Save the file to a shared folder that you can access from the computer where you have **ESET Remote Administrator Console** installed, or to a removable disk such as a USB flash drive that you can use to transport the file to that computer.

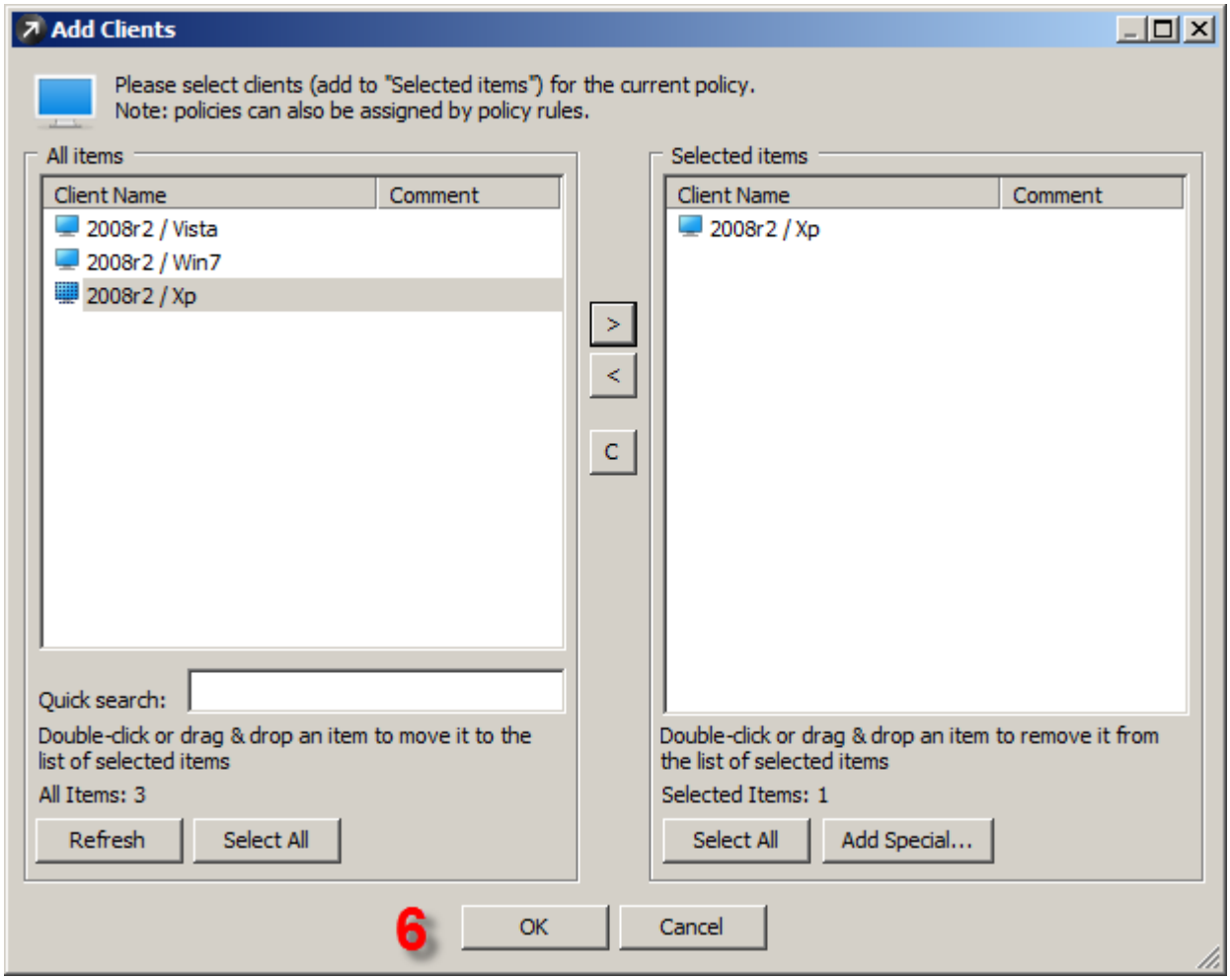


- **ESET Remote Administrator Console**

5. From the ESET Remote Administrator main menu click **Tools** > **Policy Manager**, and then click **Add New Policy**. In the **Create New Policy** window select the radio button for **Copy policy configuration from .xml file**. Click **...** and browse to the *.xml* file that you saved in step 4. Click **OK** once you are finished.



6. Select the new policy and click **Add Clients...** to add new clients or groups to the policy. After the clients are selected, click **OK** to confirm.



NOTE: You can also use **Policy Rules** to automatically add clients with new product versions to this policy. Read more

about policy rules in the ESET Remote Administrator 5 user manual.

7. Click **OK** to confirm the changes and to close the **Policy Manager**. The new policy will be enforced on client workstations the next time that they log into the ESET Remote Administrator Server.

3.5 Restore/Failed upgrade

If installation should fail when the old version is uninstalled and the new version is not installed, it is possible to restore your saved data using the backup to a fresh installation of an older version of ESET Remote Administrator (from the version where the backup was created).

1. Install ESET Remote Administrator 4.x.
2. Restore the data (settings, license files, etc.) saved during the Server backup.
3. Using the **Database restore task** in the **ERA Maintenance Tool**, restore the database saved during the Database backup:

Go to **Start** > **All Programs** > **ESET** > **ESET Remote Administrator Server** > **ESET Remote Administrator Maintenance Tool**. Select **Database restore (from an external dump file)**.

The first step is to check the database connection.

If the database is an MS Access database, specify the path to the *.mdb* file. The path specified during <%ERA_SERVER%> installation is used by default.

All other database formats require additional parameters to be set:

- Connection string: Special string used to identify the source database
- Username: Username for accessing the database
- Password: Password for accessing the database
- Schema name: Name of a schema (available for Oracle and MS SQL only)

Click **Load current server configuration** to use the current ERA Server settings. Click **Test Connection** to test the database connection. If the connection cannot be established, check the parameters for errors. After the database test is successful click **Next**.

For all database types besides MS Access database select whether to create the database tables automatically (**Create tables in the database automatically**) or insert the tables into the database later (**View Script** > **Save to File**) in the next step. For an MS SQL database the **Create a new database ESETRADB automatically** option automatically creates a new MS SQL database named ESETRADB. The final step is to confirm the database restore.

Select the file from which the database is to be restored in the next step. Optional parameters in the lower part of the window enable you to import a file from a different database type as selected in the previous step (**Allow import from a different type of database**) as well as to stop ESET Remote Administrator Server during database restore (**Stop server during processing task**). Click **Next** to confirm the task execution.

3.6 Finish

Once your upgrade to the latest version is completed, you can explore the new features of ESET Remote Administrator 5. See the ESET Remote Administrator user manual for more information.